



Filing ID #10020555

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** William Tanoos  
**Status:** Congressional Candidate  
**State/District:** INo8

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 04/23/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 College Savings Account [OT]		\$1,001 - \$15,000	Dividends	None	None
DESCRIPTION: This is a 529 college savings plan that was set up last year (end of 2016) and owned by my grandmother for the benefit of my dependent child.					
First Financial Bank Accounts [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Joint ETF & Closed End Funds ⇒ Calamos Market Neutral Income Fund CL I (CMNIX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Joint ETF & Closed End Funds ⇒ Cash & Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Joint ETF & Closed End Funds ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Joint ETF & Closed End Funds ⇒ iShares Core S&P 500 ETF (IVV) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Joint ETF & Closed End Funds ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Joint ETF & Closed End Funds ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint ETF & Closed End Funds ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]	JT	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Kathryn Tanoos 401K ⇒ American Funds New Perspective Ret Opt [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Kathryn Tanoos 401K ⇒ Ivy Mid Cap Growth Ret Opt [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Kathryn Tanoos 401K ⇒ Transamerica Partners Stock Index Ret Opt [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Kathryn Tanoos 401K ⇒ Vanguard Small-Cap Index Ret Opt [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
U.S. Savings Bond [GS]		\$1 - \$1,000	Interest	None	None
DESCRIPTION: This is a \$50 U.S. Savings Bond issued 09/1983. It matured 09/2013 with a total interest of \$90.32.					
U.S. Savings Bonds [GS]	SP	\$1,001 - \$15,000	Interest	Not Applicable	Not Applicable
DESCRIPTION: These are three (3) U.S. Savings Bonds owned by my spouse that do not mature until 06/2033, 01/2034, and 01/2037 respectively. Per U.S. House of Representatives Committee on Ethics Financial Disclosure Statements Instruction Guide, the interest is not reportable until maturity.					
Universal Life Option 1 - State Farm - Premium Paying Policy [WU]	JT	\$15,001 - \$50,000	Interest	None	None
DESCRIPTION: This is a universal life policy from State Farm for our dependent child. Per U.S. House of Representatives Committee on Ethics Financial Disclosure Statements Instruction Guide, I am required to disclose only the name of the insurance company, the type of policy, and the category of the policy's year-end cash value. I am not required to disclose income generated by universal life policies.					
WTT Roth IRA ⇒ SCHWAB TARGET 2040 FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Fleschner, Stark, Tanoos & Newlin	Salary	\$27,650.00	\$86,350.00
Fleschner, Stark, Tanoos & Newlin	Spouse Salary	N/A	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	Vigo County Historical Society

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Joint ETF & Closed End Funds (Owner: JT)  
LOCATION: US
- Kathryn Tanoos 401K (Owner: SP)
- WTT Roth IRA

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** William Tanoos , 04/23/2018